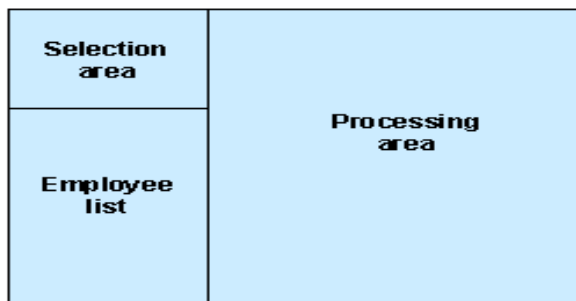


Benefits Module Enhancements

A General Benefits Information (infotype 0171) record must exist, and be active, for any employee enrolled in benefits. If the employee does not have this infotype and is enrolled in benefits, they will fail payroll processing.

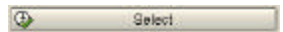
- Always ensure that you are maintaining the correct employee. You initially select employees for inclusion in the employee list, which is displayed on the left side of the screen throughout processing. From this list, you then select and process individual employees.
 - If you discover that you have selected the wrong employee and are encountering difficulty exiting out of the transaction, type **/n** in the command field and hit enter. This will return you to the SAP Easy Access screen.

The following graphic shows the layout of the screens for individual employee processing:



In the **selection area**, you select the employees that you wish to process. The selection technique that you use depends on whether you want to select individual employees or groups of employees:

To select individual employees, enter either the employee number or ID number on the **Direct selection** tab and then click



To select a group of employees, enter the appropriate grouping(s) on the **Selection set** tab. Click **Add** to add your selection to the **employee list** or **Replace** to replace the contents of an existing list with this selection. The **employee list** can also be sorted filtered, or deleted, as required.

To process an employee, single click on the appropriate entry in the employee list. The relevant data for the selected employee is automatically displayed in the **processing area**.

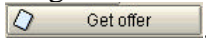
Note: The employee list is stored in the ABAP Shared Memory and usually remains available throughout your work session. If the memory reaches its maximum capacity or is refreshed, however, you will need to regenerate the list.

Enrollment


1. Single-click on the relevant employee.

A list of possible offers is displayed with the corresponding validity period.

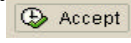
2. To generate an offer, double-click on an offer or select the offer and click



A list of the plans for which the employee can enroll appears, structured according to plan type. For each plan, the status and enrollment validity period are shown.

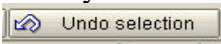
You can generate an offer for a different participation start date by clicking , changing the date, and reselecting the offer.


3. Single-click on a plan to select it for enrollment or to make changes.

Default enrollment data is displayed. Make any necessary changes to this data in accordance with the employee's wishes. Click  to confirm your selections.

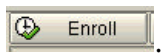
Once your selections are complete, the plan is marked with a green check to indicate that it is selected.

4. Once you have entered the employee's elections for all plans, check whether you have selected the correct plans.

To deselect a plan for which you do not want to complete enrollment, put the cursor on the plan line and click .

5. If you are satisfied with the plan selections, click .

A list of actions that will be performed by the system is displayed for you to confirm.

6. If you are satisfied with the actions that the system will perform, click .


Result

The employee is enrolled and you can print a confirmation form by performing the Create Confirmation Form transaction.

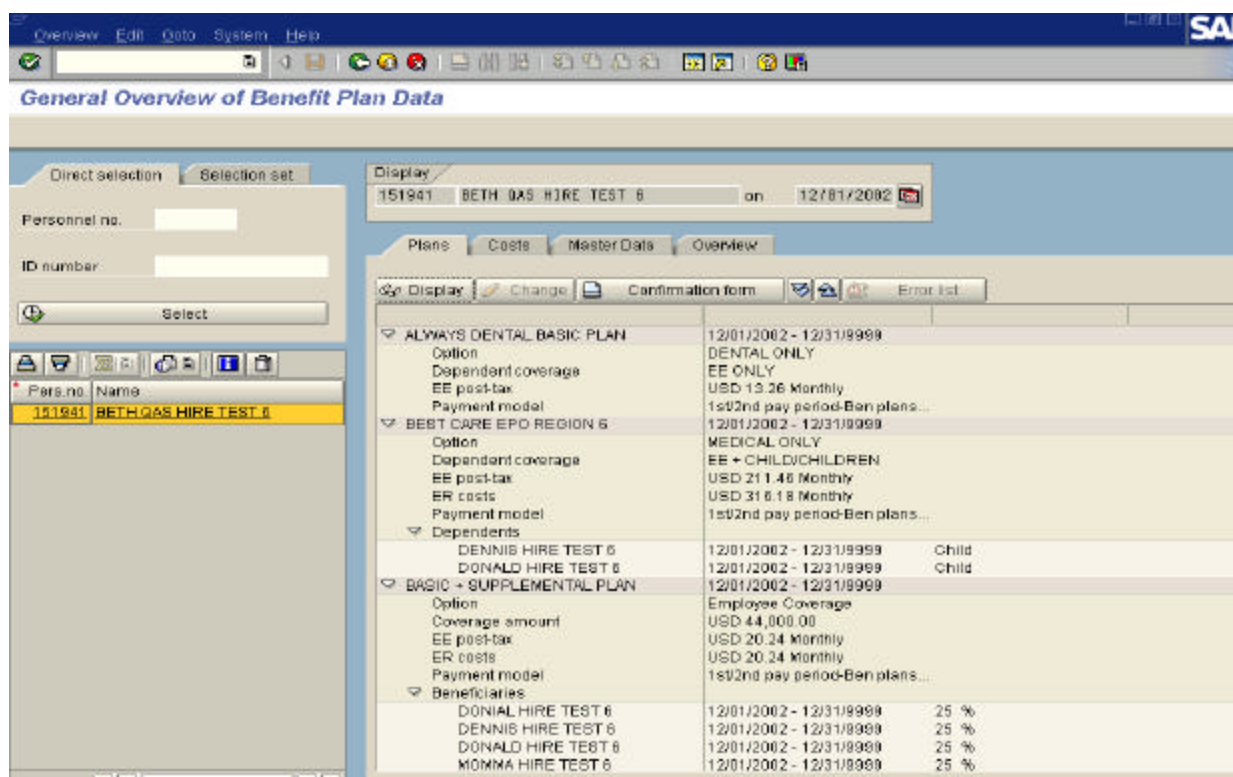
Hint: Clicking  on the Enrollment screen *displays* the General Overview of Benefit Plan Data screen for the selected employee.

Participation Overview (HRBEN0006)

This function allows you to display information about the benefits of individual employees. You would use this function, for example, if you receive an inquiry from an employee regarding their current enrollments.

1. Choose *Human Resources ? Personnel Management ? Benefits ? Participation Overview*.
2. Select the employees for whom you wish to display an overview. Click  to change the system default date and overview for a different period of time.
3. Single-click on the relevant employee.

A series of tabs appears, showing the different categories of information available.



General Overview of Benefit Plan Data

Display: 151941 BETH QAS HIRE TEST 6 on 12/01/2002

Plans Costs Master Data Overview

Display Change Confirmation form Error list

Plan	Option	Dependent coverage	EE post-tax	Payment model	1st/2nd pay period-Ben plans...
ALWAYS DENTAL BASIC PLAN	DENTAL ONLY	EE ONLY	USD 13.26 Monthly	12/01/2002 - 12/31/9999	
BEST CARE EPO REGION 6	MEDICAL ONLY	EE + CHILD/CHILDREN	USD 211.46 Monthly	12/01/2002 - 12/31/9999	
			USD 316.18 Monthly	1st/2nd pay period-Ben plans...	
DENNIS HIRE TEST 6				12/01/2002 - 12/31/9999	Child
DONALD HIRE TEST 6				12/01/2002 - 12/31/9999	Child
BASIC + SUPPLEMENTAL PLAN	Employee Coverage		USD 44,000.00	12/01/2002 - 12/31/9999	
			USD 20.24 Monthly		
			USD 20.24 Monthly		
			1st/2nd pay period-Ben plans...		
DONALD HIRE TEST 6				12/01/2002 - 12/31/9999	25 %
DENNIS HIRE TEST 6				12/01/2002 - 12/31/9999	25 %
DONALD HIRE TEST 6				12/01/2002 - 12/31/9999	25 %
MOMMA HIRE TEST 6				12/01/2002 - 12/31/9999	25 %

Plans

Displays selected options, dependents/beneficiaries, monthly costs, employee and employer contributions. If you highlight a plan and then click the display icon, the system takes you to the master data Display 'Infotype' screen for that plan.

Plans Costs Master Data Overview			
<div> Display Change Confirmation form Error list </div>			
ALWAYS DENTAL BASIC PLAN	12/01/2002 - 12/31/9999		
Option	DENTAL ONLY		
Dependent coverage	EE ONLY		
EE post-tax	USD 13.26 Monthly		
Payment model	1st/2nd pay period-Ben plans...		
BEST CARE EPO REGION 6	12/01/2002 - 12/31/9999		
Option	MEDICAL ONLY		
Dependent coverage	EE + CHILD/CHILDREN		
EE post-tax	USD 211.46 Monthly		
ER costs	USD 316.18 Monthly		
Payment model	1st/2nd pay period-Ben plans...		
Dependents			
DENNIS HIRE TEST 6	12/01/2002 - 12/31/9999	Child	
DONALD HIRE TEST 6	12/01/2002 - 12/31/9999	Child	
BASIC + SUPPLEMENTAL PLAN	12/01/2002 - 12/31/9999		
Option	Employee Coverage		
Coverage amount	USD 44,000.00		
EE post-tax	USD 20.24 Monthly		
ER costs	USD 20.24 Monthly		
Payment model	1st/2nd pay period-Ben plans...		
Beneficiaries			
DONAL HIRE TEST 6	12/01/2002 - 12/31/9999	25 %	
DENNIS HIRE TEST 6	12/01/2002 - 12/31/9999	25 %	
DONALD HIRE TEST 6	12/01/2002 - 12/31/9999	25 %	
MOMMA HIRE TEST 6	12/01/2002 - 12/31/9999	25 %	

Costs

Displays employee and employer costs. The benefit period for calculations defaults as Bi-weekly. You may select Semi-monthly to view the employee and employer semi-monthly costs/percentages for the benefit plans. Click 'Expand all' to display the costs for each plan.

General Overview of Benefit Plan Data			
<div> Overview Edit Quit System Help </div>			
<div> Display Change Confirmation form Error list </div>			
151941	BETH QAS HIRE TEST 6	on	12/01/2002
<div> Plans Costs Master Data Overview </div>			
<div> Expand all Error list </div>			
Cost overview (ER costs)		Employee costs	Employer costs
ALWAYS DENTAL BASIC PLAN		6.63 USD	0.00 USD
1st/2nd pay period-Ben plans			
BEST CARE EPO REGION 6		105.73 USD	150.09 USD
1st/2nd pay period-Ben plans			
BASIC + SUPPLEMENTAL PLAN		10.12 USD	10.12 USD
1st/2nd pay period-Ben plans			
OPTIONAL BASIC/BAS+SUPPE L		14.96 USD	0.00 USD
1st/2nd pay period-Ben plans			
DEP BASIC+SUPPLEMENTAL PL		1.00 USD	0.00 USD
1st/2nd pay period-Ben plans			
OPTIONAL DEP LIFE		0.16 USD	0.00 USD
1st/2nd pay period-Ben plans			
PERSONAL ACCIDENT INSURAN		2.93 USD	0.00 USD
1st/2nd pay period-Ben plans			
LA STATE EMPLOYERS RETIREMENT			
EE pre-tax		7.50 %	of base salary
Pre-tax rollover		No	
Employer contribution			
01 Savings contribution		14.10 %	of base salary

Master Data

Displays a summary of relevant employee data. Source of this data includes *Personal Data* (0002), *General Benefits Information* (0171), *Organizational Assignment* (0001), and *Family/Related Person* (0021).

The screenshot shows a software window titled 'Display' with a search bar containing '151941 BETH QAS HIRE TEST 6' and a date '12/01/2002'. Below the search bar are tabs for 'Plans', 'Costs', 'Master Data' (selected), and 'Overview'. The main content area is divided into sections: 'Personal data', 'General benefits information', 'Organizational data', and 'Family/related persons'. The 'Personal data' section shows 'Personnel no.' 151941, 'Entry date' 10/14/2002, 'ID' 657-85-1236, and 'Date of birth' 06/17/1952. The 'General benefits information' section shows 'Benefit area' LA, '1st program grouping' STAT, and '2nd program grouping' FTIM. The 'Organizational data' section shows 'Personnel area' 0374, 'Personnel subarea' 0050, 'Employee group' A, 'Employee subgroup' 01, and 'Payroll area' B1. The 'Family/related persons' section shows three entries: DONIAL HIRE TEST 6, DENNIS HIRE TEST 6, and DONALD HIRE TEST 6, all with 'Child' status.

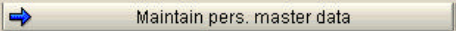
Personal data	
Personnel no.	151941
Entry date	10/14/2002
ID	657-85-1236
Date of birth	06/17/1952

General benefits information	
Benefit area	LA
1st program grouping	STAT
2nd program grouping	FTIM

Organizational data	
Personnel area	0374
Personnel subarea	0050
Employee group	A
Employee subgroup	01
Payroll area	B1

Family/related persons	
DONIAL HIRE TEST 6	Child
DENNIS HIRE TEST 6	Child
DONALD HIRE TEST 6	Child



It is not suggested that you do not utilize the  option to change employee master data unless directed to do so in on-line help. If utilized incorrectly, this could result in data inconsistencies.

Overview

Displays a participation time line. If necessary, change the **Start date** and **End date** to reflect the time period you wish to display. You can display the actual infotype by double-clicking the specific plan you wish to see.

The screenshot shows a software interface with the following elements:

- Display Section:** Employee ID 151941, Name BETH QAS HIRE TEST 6, Start date 10/01/2002, End date 12/31/2003.
- Tabs:** Plans, Costs, Master Data, Overview (selected).
- Plan Types List:**
 - DENTAL: ALWAYS DENTAL BASIC PLAN
 - MEDICAL: BEST CARE EPO REGION 6
 - LIFE INSURANCE: BASIC + SUPPLEMENTAL PLAN
 - OPT EE LIFE INS: OPTIONAL BASIC/BAS+SUP EE LIFE
 - DEPENDENT LIFE: DEP BASIC+SUPPLEMENTAL PLAN
 - OPT DEPEND LIFE: OPTIONAL DEP LIFE
 - ACCIDENT INSUR: PERSONAL ACCIDENT INSURANCE
 - RETIREMENT: LA STATE EMPLOYEES RETIREMENT
 - DEPENDENT CAR: DEPENDENT CARE
- Timeline:** A horizontal bar chart showing the duration of each plan from October 2002 to December 2003.

Monitor Benefits Eligibility (HRBEN0003)

During enrollment processing, the system offers only those plans for enrollment for which employees are eligible. It also performs extensive checks to ensure that the employee plan elections are consistent with the setup of plans and flexible administration settings. After enrollment, however, inconsistencies in plan participation can occur as a result of the following:

- **Changes in an employee's organizational assignment**

If an employee falls into a different grouping for any plan-related or administrative settings, she may become ineligible for the plans in which she is currently participating.

- **Manual adjustments made directly on infotype records**

Although the system does not prevent you from changing employee elections directly on plan infotypes, if done in this manner, inconsistencies can result. You must use the appropriate Enrollment/Maintain Adjustment Reason transaction to make changes to benefit plans infotypes, except where specifically stated in the online help to do otherwise.

The **Participation Monitor** enables you to detect employees who are no longer eligible for plans in which they are participating and find any inconsistencies in plan elections. For example, when the employee has a dependent child between the ages of 21 and 24 covered by a benefit plan, the child must be a full-time student for continuation of coverage. When the student verification is done the Student checkbox is selected on the Family/Related Person infotype. If the checkbox is

not selected for this dependent child age group the employee along with the affected dependent child will be included in the output of this transaction.

We recommend that you run the **Participation Monitor** regularly to detect ineligibility and election inconsistencies as soon as they occur. If you must print the output, you will have to execute the transaction in background. Refer to http://osisike.doa.state.la.us:5050/state.asp?task=Introduction_to_ISIS_HR_Reporting for more information on Background Processing.

Terminating Enrollments


General Benefits Information (Infotype 0171) must exist for the entire period the employee is enrolled in benefits plans. During the **Separation** and **Transfer NP-P** actions, on the Change Benefits Information screen leave the **To** date as 12/31/9999.

1. Follow the appropriate action or maintain adjustment reason transaction to get to the Termination of Plan Participation screen.
2. Select employees for processing.
3. Single-click on the relevant employee.

A list of the plan types in which the employee is enrolled is displayed with the corresponding validity period.

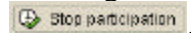
4. Select the plan type(s) that you wish to terminate.

The default termination date is displayed next to each plan. This date is based on the system date and is dependent on the termination rules assigned.

If you want the termination dates for all plans to be based on a different system date, you can change the system date by clicking .

5. Click  to terminate participation in the selected plans.

A dialog box appears showing the plan types that will be terminated. To continue, click



Result

The system delimits the appropriate plan infotypes, taking into account any coverage continuation period defined in a termination rule for the plan.